



# *New Orleans Chapter* **Le Journal de Nouvelle Orleans**

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January 2008

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*AGA serves government accountability professionals by providing quality education, fostering professional development and certification, and supporting standards and research to advance government accountability.*

The AGA (Association of Government Accountants) will hold a Buffet Lunch meeting Thursday January 17, 2008 **11:30am in the Executive Dining Room at NFC.**

**\$13.00 for Members and Non Members**

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## Speakers

Earline Brown and Sharon Evans of the IRS will do a presentation on **TAX LAW CHANGES** for the upcoming filing season.

### **Earline Brown**

Earline Brown began her career with the IRS in October 1988 as a Taxpayer Service Representative. Earline assisted taxpayers at the Front Counter and she also helped them resolve their account related issues. The majority of her time as a Taxpayer Service Representative was devoted to assisting taxpayers and/or their representatives in the Problem Resolution Program and on the Tax Practitioner Hotline.

Earline became a Revenue Agent in 1994. In addition to her regular Revenue Agent assignments, Earline completed numerous details such as working as a Cooperating Agent on a Grand Jury Task Force with the IRS Criminal Investigation Division, the U. S. Secret Service, the U.S. Department of Agriculture and the LA State Department of Revenue and Taxation. Earline also served as a Public Affairs Specialist in the Communications Division and as a Loaned Executive to the Combined Federal Campaign. Earline became a Stakeholder Liaison in October 2007.

Earline is a graduate of Loyola University in New Orleans with a Bachelor's degree in Public Administration and a Masters in Business Administration.

## Sharon Evans

Sharon is a Senior Stakeholder Liaison in the Stakeholder Liaison Field Division of the Internal Revenue Service, located in New Orleans.

In this newly organized division of the IRS, she acts as a liaison between the Internal Revenue Service and Practitioner Groups as well as Small Business Entities for the state of Louisiana. Sharon has served as the lead for Louisiana's Construction Initiative and coordinated the Mid-South Area's TIP/TRAC agreement program with the Food and Beverage Industry.

She has been with the IRS since 1986 where most of her experience has been in Collection as a Revenue Officer. Her experience with IRS also includes various positions in other divisions, such as, the Gaming Group, Employment Tax Group, Taxpayer Advocate Details, and a Specialist in the EEO Division. Sharon has worked several other details throughout her career at the IRS.

She came to the IRS with 8 years of Outside Sales Experience with a large retail establishment. She is a graduate of Xavier University in New Orleans with a Bachelor's degree in Marketing.

*This presentation will qualify for one hour of professional education credit.*

### PRESIDENT'S MESSAGE

I had the privilege of attending the GAO Forum on Federal Financial Management Systems which was held in Washington, D C at the GAO headquarters on December 11. I attended the meeting at the invitation of David Walker, Comptroller General of the United States, who participated throughout the afternoon.

A Summary of the Meeting will be prepared and that Summary will be available to the Public. Approximately 33 individuals were invited. In addition, about 9 GAO staff members participated to take extensive notes. Some of the invited guest who attended, other than myself are as follows:

Kenneth E. Carfine, Fiscal Assistant Secretary, Department of Treasury  
John R. Cherbini, Partner in Charge, Federal Advisory Services, KPMG, LLP  
Clarence C. Crawford, Director of Financial Management Solutions Center, Deloitte Consulting, LLP  
Geoffrey Darnell, Director, Public Sector Solution Management, SAP  
Michael G. Barker, Director, Federal Programs, Oracle Corporation  
Hon. Earl E. Devaney, Inspector General, Department of Interior  
Larry J. Eisenhart, Vice President of Financial Management, AOC Solutions, Inc (Former Deputy CFO, State)  
Joseph Farinella, Assistant Inspector General for Audit, USAID  
Lisa D. Fiely, Acting Chief Financial Officer, Labor  
Hon. Gregory H. Friedman, IG, Energy  
Terry L. Hurst, Deputy Assistant Secretary for Grants, HHS

Hon. Tina W. Jonas, Under Secretary of Defense (Comptroller) and CFO, DoD  
C. Morgan Kinghorn, Jr. Chief Operating Officer, Global Public Sector, Grant Thornton (Former OMB, IRS, and EPA)  
Joseph L. Kull, Director of Federal Practice PricewaterhouseCoopers, (Formerly at OMB)  
Wayne G. Leiss, Chief Information Officer, Office of Thrift Supervision, Treasury (Former OMB)  
Daniel J. Murrin, Partner, Americas Director of Public Sector Services, Ernst and Young, LLP  
Catherine Nelson, Vice President, Booz Allen Hamilton  
Elizabeth T. O'Neil, Director of Consulting, CGI Federal, Inc.  
Hon Phyllis f. Scheinberg, Assistant Secretary for Budget and Programs/Chief Financial Officer, Transportation  
Dr. Relmond P. Van Daniker, Executive Director, AGA  
Daniel I. Werfel, Acting Controller, Office of Federal Financial Management, OMB  
James B. Whittaker, President, The Whittaker Group

The senior GAO personnel in attendance were:

Sallyanne Harper, Chief Administrative Officer (Former CFO, EPA)  
Jeffrey C. Steinhoff, Managing Director, Financial Management and Assurance  
George Strader, Controller, Controller/Administrative Services Office (Former Deputy CFO HHS)  
Nabajyoti Barkakati, Acting, Chief Technologist, Applied Research and Methods.

There were three area of discussion. The first Topic covered "Shaping the Future of Government Financial Management; the second Topic covered "Lessons Learned from Financial Management System Implementations to Date"; and, the third Topic covered "Transforming Organizational Culture to capitalize on Financial Management System Modernizations." After each discussion area, questions were presented to the participants for a vote. The opinions of the participants were then tallied.

Some of the conclusions were:

1. Over the past 20 or so years, the Federal Financial Management community has made substantial progress of improving controls and providing reliable, useful, timely and relevant financial information. Unfortunately, this financial data is used primarily by the accountants and auditors. The information provided is generally not used by program managers to manage the business of government. So, we in the financial community have mostly worked on compliance issues and have not added value to the management of programs. There is a real need to have open communications among budget officers, accountants, and program managers to provide truly useful financial data.
2. There is a disconnect between the budget information that the Congress really wants and the financial data provided by those Federal officials in the business of producing financial reports.
3. There was general agreement that there is a need for more resources to support the Federal financial management community. Also there was agreement that there are fewer and fewer Federal employees involved in producing financial information and there is more contractor involvement. The group felt that there is a need for contractors but projects should be lead by competent financial personnel who work for the Government.
4. There is a need for more readily available business information within an agency. This information should combine performance measurements with financial information. Dashboards should provide readily available information to officials.

5. There was general agreement that all Federal agencies do not need to have their own systems. Purchasing services from other Federal agencies or from the private sector is a good approach for agencies. This should not be limited to small agencies because large agencies can also benefit from purchasing such services. The key is to assure that the agency has sufficient control over and access to their information.
6. Federal financial managers can be of more value to their agency if they can provide significant analysis of financial data with less of their time being spent on compliance.
7. There is a dire need to marry performance data with financial data in order to better serve the program managers of an agency.
8. The agency CFO's should have functional responsibility for the budget within an agency and the IT as it relates to systems development. Without such control, the CFO does not have a "seat at the table" within the agency.
9. There is a real need to strengthen the resume requirements for Federal CFO's. Also there is a need to determine whether agency level CFO's need to be Presidential and Senate Confirmed. Perhaps they could be Presidential appointees without the requirement for senate confirmation. For continuity purposes, it would probably be better if the jobs were career Federal jobs rather than political appointees who tend to turn-over quickly.



Clyde G. McShan, II  
Chapter President

### MEMBER ACCOMPLISHMENTS AND NEWS

Please share news about yourself or other AGA members. Contact Godwin Ndukwe at [godwinnola@aol.com](mailto:godwinnola@aol.com)

### AGA'S NEW ORLEANS CHAPTER MEETINGS (TENTATIVE) 2007-2008

DATE	TIME	PLACE	SPEAKER
January 17, 2008	11:30 A.M.	National Finance Center Executive Dining Room 13,800 Old Gentilly Road New Orleans, LA	Internal Revenue Service – Tax Update

February 21, 2008	5:30 P.M.	Cannon's Restaurant 4141 St. Charles Ave. New Orleans, LA	Jim Incaprera, Internal Audit Manager, Iberia Bank – Investigating and Prosecuting Fraud & Embezzlement
March 20, 2008	5:30 P.M.	Five Happiness Restaurant 3605 S. Carrollton Ave. New Orleans, LA	Joint Meeting with American Society of Women Accountants
April 17, 2008	5:30 P.M.	Bull's Corner 1036 W. Airline Hwy. LaPlace, LA	Joint Meeting with Baton Rouge AGA Chapter, Richard L. Fair, CGFM, State Auditor, State of New Jersey, AGA's National President – AGA Update
May 30, 2008 (Final Date Depends on Team Schedule)	5:30 P.M.	Zephyr Stadium 6000 Airline Drive Metairie, LA	Chapter Awards Ceremony

## EDUCATION OPPORTUNITIES

### **AGA'S NEW ORLEANS CHAPTER EDUCATION EVENTS** **2007-2008**

DATE	TIME	PLACE	TOPIC
February 6, 2008	1:00 P.M. – 3:00 P.M	National Finance Center 13.800 Old Gentilly Road New Orleans, La	Internal Controls
May 7, 2008	1:00 P.M. – 3:00 P.M	National Finance Center 13.800 Old Gentilly Road New Orleans, La	Ethics
Spring, 2008	TBD	TBD	TBD

## 2008 PDC Hotel Now Accepting Reservations

It's time to look ahead to PDC 2008. Next year's conference will take place July 27 – 30 at the Atlanta Marriott Marquis.

The room rate is \$129 (plus tax). Rates are only guaranteed until July 6, 2008, *or until the block is sold out*. Reservations received after the block has been filled will be made on a space-available basis and may be subject to higher rates. We encourage you to make your reservations early for the best price and availability.

To make a reservation, please call the hotel at 888.829.1396 and mention you are attending the “AGA PDC” to receive the discounted rate. A credit card is required to guarantee the reservation. Or, for your convenience, [you may also reserve a room online](#).

## Take the CGFM Examinations Before the NLC



AGA is once again offering a great opportunity to take the CGFM Examinations and earn your CGFM before the Sixth Annual National Leadership Conference (NLC) in Washington D.C. Whether you've found it difficult to find time to complete the three exams or just need an extra reinforcement of the material, this is your chance to get it done.

To help you reach that goal, we are offering a two-day Intensive Review Course on Monday, Feb. 18, and Tuesday, Feb. 19, and an opportunity to take the CGFM Examinations Feb. 20 – 21. The cost of the course is only \$249 for qualified participants, and it offers 18 CPE hours. **Special Bonus:** The CGFM Examinations are offered at no cost to course attendees.

This course is designed as a supplement to previous preparation for the CGFM Examinations, so this is a perfect opportunity for those individuals who have already attended GFM training courses or have been preparing by using the CGFM Study Guides. Enrollment is limited and popular exam time slots are reserved quickly, so don't delay.

# ASSOCIATION OF GOVERNMENT ACCOUNTANTS

## STATEMENT OF NET ASSETS

December 31, 2007

### ASSETS

#### CURRENT ASSETS:

Cash	\$662.63
Savings	6,606.78
Accounts Receivable	710.00
Deposit – Restaurants	.00
Prepaid Seminar Expenses	448.00
<b>TOTAL ASSETS</b>	<b><u>\$8,427.41</u></b>

### LIABILITIES AND NET ASSETS

Accounts Payable	<u>65.18</u>
<b>NET ASSETS:</b>	
Hurricane Relief Fund	\$3,178.00
Membership Recruitment	300.00
Habitat Project Funds	243.47
Unrestricted net assets	<u>4,640.76</u>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b><u>\$8,427.41</u></b>

#### Katrina Relief Fund (Details)

Donations Received	+\$10,661.50
Member Dues Rebate	4,638.50
Members Meeting Subsidy	1,860.00
Audio Conf. Subsidy	435.00
April Spring Seminar	875.00

## STATEMENT OF REVENUES, EXPENSES

For 6 months ended December 31,2007

### OPERATING REVENUES

Education/Training	\$ 710.00
Business Meetings	1,781.50
50/50 Raffle	69.00
Membership Dues	380.00
Christmas Party	225.00
Interest Income	49.14
<b>Total operating revenue</b>	<b><u>\$1,217.76</u></b>

### OPERATING EXPENSES

Education/Training	\$448.00
Business Meetings	1,877.52
Speakers Gifts	.00
AGA PDC Raffle Basket	15.00
50/50 Raffle	35.00
Postage/Supplies/Gifts	72.00
Bank Charges	.00
Scholarship Winner	.00
Christmas Party	1,939.34
Officer Awards	.00
<b>Total operating expenses</b>	<b><u>\$4,371.86</u></b>

**OPERATING INCOME (LOSS)** \$(1,157.22)

**NONOPERATING REVENUES (EXPENSES)** .00

**INCOME (LOSS) BEFORE CONTRIBUTIONS** \$(1,157.22)

**CAPITAL CONTRIBUTIONS** (26.00)

National Office Donation +325.00 **CHANGE IN NET ASSETS** \$(1,131.22)

**NET ASSETS AT BEGINNING OF PERIOD** \$5,771.98

Remaining Balance \$3,178.00 **NET ASSETS AT END OF PERIOD** \$4,640.76

## RECOGNITION POINTS

Recognition Categories	Max Credits Per Category	Credits Through Jan 2008
Communications	3,000	
Membership	3,000	
Community Service	2,000	
Awards	1,000	
Chapter Leadership, Planning and Participation	3,000	
Education & Professional Development	4,000	
Certification	4,000	
Total	20,000	

(Not available at this time)



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